

WHAT IS CLAIMED IS:

1. A method of representing a customer's product purchasing profile to a customer service representative in an automated customer relationship management environment, said method comprising the steps
5 of:

identifying a set of products for a sales campaign;
identifying one or more relationships between products within said set of products;

representing each product from within said set by a distinct image in
10 a graphical display; and

visually distinguishing between said distinct product images in said graphical display based upon said identified product relationships.

2. The method of claim 1, wherein said step of identifying one or
15 more relationships between said products includes distinguishing from within said product set, products owned by said customer.

3. The method of claim 2, further comprising the steps of:
identifying one or more demographic factors associated with said
20 customer;

determining a propensity of said customer to purchase each of one or more unowned products in said product set from said one or more demographic factors; and

using said determined purchase propensity to distinguish between
25 said product images in said graphical display.

4. The method of claim 3, further comprising the step of distinguishing between different levels of purchase propensity by different visual criteria.

5 5. The method of claim 1, wherein said graphical display is an icon in a toolbar associated with a customer personalization software application.

6. The method of claim 5, wherein selecting said toolbar icon
10 displays a graphical representation of said product purchasing profile on a customer service representative's workstation screen.

7. The method of claim 1 wherein said product images are visually distinguished by color.

15 8. The method of claim 1, further comprising the step of mapping each of said product images into a two-dimensional graphical display according to one or more inter-product relationships.

20 9. The method of claim 8, wherein said product images are arranged in a first dimension according to cross-sell potential and in a second dimension according to up-sell potential.

10. The method of claim 1, further comprising the steps of:
 selecting a product image from said graphical display; and
 launching a sales script for said customer service representative
 corresponding to said selected product image.

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11. A method of graphically representing product purchase
 profiles and sales guidance to a customer service representative in an
 automated customer relationship management environment, said method
 comprising the steps of:

10 identifying a customer, said customer being associated with one or
 more demographic attributes;

accessing purchasing data for said customer from a data store, said
 purchasing data including products owned by said customer and products
 related by one or more criteria to said owned products;

15 determining a propensity of said customer to purchase each of said
 related products based upon one or more of said demographic attributes;

representing each of said owned and related products by a visual
 image;

mapping said product images into a graphical display; and

20 visually distinguishing between said product images in said display
 based upon said purchase propensity.

12. The method of claim 11, further comprising the steps of:
 selecting a product image from said graphical display; and
 25 launching a sales script for said customer service representative
 corresponding to said selected product image.

13. The method of claim 11, wherein said step of visually distinguishing between said product images comprises identifying different product images by different colors.

5 14. The method of claim 11, wherein said mapping step further comprises organizing each of said owned and related products in a two-dimensional graphical display according to inter-product relationships between the products.

10 15. The method of claim 14, wherein said products are organized in a first dimension according to cross-sell potential and in a second dimension according to up-sell potential.

15 16. A computerized system for graphically representing a customer's product purchase profile and sales guidance to a customer service representative in an automated customer relationship management environment, said system comprising:

- a workstation display screen;
- one or more images on said display screen representing products,
- 20 said product images being mapped into a two-dimensional graphical display;
- an indicating device moveable between said product images on said display screen; and
- one or more distinct visual criteria in which to depict said product
- 25 images in order to distinguish between said products.

17. The system of claim 16, further comprising a personalization application comprising executable instructions for mapping said product images into said two-dimensional graphical display according to one or more inter-product relationships.

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18. The system of claim 16, wherein said product images are depicted by said one or more distinct visual criteria according to a propensity of said customer to purchase each of said products.

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19. The system of claim 17, wherein said personalization application maps said product images in a first dimension according to an up-sell relationship and in a second dimension according to a cross-sell relationship.

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20. The system of claim 17, wherein said personalization application generates one or more sales scripts for said customer service representative depending on a position of said indicating device on said product images.

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21. The system of claim 18, further comprising a builder service including executable instructions for associating a distinct visual criteria with each of one or more purchase propensity levels.